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GROUP AND CROSS-MEDIA OWNERSHIP OF TELEVISION STATIONS: 1990

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GROUP AND CROSS-MEDIA OWNERSHIP OF TELEVISION STATIONS: 1990

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Introduction

Group ownership of TV stations has been practiced since the beginning of the television industry. In 1953-54, the Federal Communications Commission adopted limits on the multiple ownership of broadcast stations to prevent any undue concentration of control of the broadcast media.[1] Those limits, which became known as the "7-7-7 rule," also sanctioned multiple station ownership and became the basis for the television industry's ownership structure for the next 30 years.

In response to the proliferation of new television stations the FCC, in 1984, adopted a new and more expansive set of multiple ownership rules, effective on March 4, 1985.[2] These rules raised the number of TV stations a single entity may own from 7 to 12 and established a ceiling that limits a group's total audience potential to 25% of the nation's television households.[3]

Under the "12 and 25% rule," a group owner's coverage is based on The Arbitron Company's estimate of TV households (as a percentage of the national total) in Areas of Dominant Influence (ADI) where the group's stations are located. The provision that a full complement of facilities must include a specific number (formerly two) of UHF stations was eliminated in favor of a 50% "discount" of the market's household percentage for UHF stations toward the 25% TV household ceiling. This discount reflects the Commission's recognition of the inherent technical coverage differences between VHF and UHF stations. The 50% UHF discount applies to all UHF stations; no distinction is made between UHF stations in mixed VHF/UHF markets and those in all UHF markets.

In addition to relaxing the rules for television, the FCC's 1984-85 order also increased the number of AM and FM radio stations allowed each owner from 7 to 12 each. However, at that time the Commission did not modify its rules concerning duopoly and cross-media ownership. The duopoly rule,[4] adopted in 1943, limited each owner to no more than one station of each type (AM, FM, or TV) in a given market area, while the cross-media ownership rule[5] forbid the establishment of media combinations that involve TV stations, daily newspapers, and radio stations serving the same community. Although most of the then existing cross-media holdings were protected from divestiture under a "grandfather" clause, the number of commonly-owned local TV-newspaper combinations has dropped sharply since this rule was adopted in 1975.

The FCC recently revised some of these local ownership rules. Specifically, it relaxed the duopoly rules to a principal city contour, thereby allowing commonly owned stations to be located closer together.[6] At the same time, the FCC determined that it will "look favorably" upon granting waivers of the one-to-a market rule for common ownership of radio and television stations in the top 25 markets where there would be at least 30 separately

owned or operated broadcast licenses or "voices" remaining after the proposed radio-television combination.[7]

Soon after the "12 and 25%" rule went into effect, the television industry underwent extensive ownership changes. Many groups expanded their station holdings. Other groups, along with numerous individual stations, changed hands through mergers, friendly acquisitions, hostile takeovers, and leveraged buyouts. Two of the three television networks and their owned-and-operated stations were acquired by new owners, while the third network came under new controlling management. However, the new multiple ownership rule was only partially responsible for the fervor of station trading that existed from 1985 through much of 1987. Other factors were speculation in station properties based on the belief in ever-rising station values, reduction in overall interest rates, and the elimination in 1982 of the FCC's anti-trafficking, or "three-year-holding rule."[8] Since 1987, station trading activity has returned to a more normal pace.

This report presents a statistical profile of television station ownership as of January 1, 1990. It was undertaken to provide current data on (1) television station multiple ownership, (2) cross-media ownership involving co-located television stations and daily newspapers, (3) newspaper-television ownership affiliations that do not involve local cross-media ownership; and (4) other media holdings of major television groups.

Special attention has been given to ownership trends. In addition, the percentages of the nation's television households (TVHH) reached by various station groups have been calculated, using the FCC's national market reach formula, as well as net weekly circulation (NWC) values.[9] These percentages may be useful in analyzing the growth potential of various owners whose stations do not yet reach the 25% TVHH ceiling.

Historical Background

Group ownership is a long established characteristic of broadcasting in the United States. The practice began in the early 1920s when Westinghouse Electric established radio stations in Pittsburgh, Boston, Chicago, Newark, and other cities. Numerous radio groups existed before World War II, and television group ownership developed quickly when television stations were built after the war. In 1953-54, the FCC adopted rules to limit the growth of groups to preserve the diversification of station licensees. However, group ownership has grown steadily since those rules were adopted. In 1956, three years after the FCC established multiple ownership limits, more than half of the VHF stations in the

top-100 markets were group owned. Today, nearly 9 of every 10 VHF outlets in those markets are licensed to multiple-station owners.

Group ownership of UHF stations developed at a slower pace. However, during recent years, acquisition of UHF outlets by group owners has accelerated sharply with a rise in their perceived economic potential. Meanwhile, the percentage of group-owned UHF stations has risen slowly because of the great increase in the number of operating UHF stations. This development and other current trends will be explored in this report.

A second aspect of this study focuses on newspaper ownership of television stations. In 1973, when the FCC reviewed the cross-media issue, 16.1% of the commercial television stations in the top-100 markets (60 of 372) were either licensed to or affiliated with a local daily newspaper.[10] By 1988, a dramatic decline in the ownership of co-located newspaper-television properties had occurred. Only 27 television stations, or 4.2% of the 647 outlets in the top-100 markets, were affiliated with local daily newspapers at the start of 1988.[11] However, the overall number of newspaper-television affiliations had increased substantially because of the growth of media companies engaged in both broadcasting and print enterprises. Of the 647 stations in the top-100 markets at the start of 1988, 174, or 26.9%, were newspaper-affiliated, compared with 77 of 372 stations, or 20.7%, in 1973.[12]

Method of Study

This study is based on a tabulation of data on the ownership of television stations in the United States as of January 1, 1990. The author maintains files of television station ownership which he updates continuously from FCC announcements of license transfers and new station start-ups, with further verification of ownership changes, as needed, through direct contact with stations involved. The rosters of stations credited to each group include all transfers of ownership approved by the FCC up to the first day of 1990. In some cases, actual assumption of station operation by the new licensee had not yet taken place.

In addition to numbers of stations held, a group's economic potential also depends on the number of viewers its stations can reach (determined by market size and coverage); the actual audience of its stations (market shares and circulation) depends greatly upon the attractiveness of the programming offered.

As in previous studies, Arbitron's net weekly circulation (NWC) data were used to determine the total weekly reach or circulation of each TV station group, based on station holdings (including transfers approved) on January 1, 1990. A circulation profile was

developed for each of the 207 identified groups, using the NWC data published in *Television and Cable Factbook* No. 58 (1990).[13] These groups, ranked by net weekly circulation, are shown in Appendix A.

The aggregate percentage of the nation's TV households in each group's respective ADI markets -- which approximates the group's potential audience -- also is included in Appendix A. These percentages, used by the FCC to measure against the 25% limit, were calculated from data in *Arbitron Ratings/Television* (1989-90 Universe Estimates Summary).[14] Appendix B lists the 100 largest ADI market areas (1989-90) with their respective percentages of the nation's TV households. With these data, one may identify the markets a group could add without exceeding the 25% limit or the stations a newly merged group could divest to meet the 25% rule.

The various tables presented here are based on the 699 TV stations (307 VHF and 392 UHF) determined to be operational in the 100 largest U.S. markets at the start of 1990. This number represents an increase of 52 stations from our last report in 1988. Market rankings are those published by The Arbitron Company for 1989-90.[15] This list, which appears in Appendix B, is based on the number of television households in each ADI market. Since it is revised annually, there are slight year-to-year changes in the composition of the top-100 markets.

The Findings

Group ownership of television stations continued its long-term expansion during 1988 and 1989. Within the top-100 markets, an all-time record of 535 stations were group-owned on January 1, 1990. On the same date in 1988, there were 497.[16] This increase of 38 stations occurred during a two-year period when the total number of stations in the same markets increased by 52, from 647 to 699. New UHF independent stations accounted for most of the increase.

Despite the industry's on-going consolidation, 36 new TV groups were formed during 1988-89, resulting in a slightly larger total number of group operators than in 1988 -- 207 in 1990 compared with 191 in 1988. Group ownership in the top-100 markets remained virtually at the same percentage level as in 1988. The 535 group-owned stations in 1990 represent 76.5% of the 699 VHF/UHF outlets in the 100 largest markets, compared with 76.8% at the start of 1988. However, the current percentage is down 2.5% from the all-time high of 79.0% reached in 1982, when the number of television stations (420) in the 100 largest markets was much smaller.

Several ownership changes occurred just before and just after January 1, 1990. Data on the 25 highest-ranking groups include the following 1989 station acquisitions and sales:

1. Sales by TVX Group included WMKW, Memphis, to MT Communications; WTVZ, Norfolk, to McFadden Communications; and WNOL, New Orleans, to Quincy Jones.

2. Sale of all of Knight-Ridder Company's stations to various owners: WTEN, Albany, WCDC, Adams, Massachusetts, and WKRN, Nashville, to Young Broadcasting; WALA, Mobile to Burnham; KOLD, Tucson, to News-Press & Gazette; WTKR, Norfolk, and WPRI, Providence, to Narragansett; KTVY, Oklahoma City, to Palmer Communications; and WJRT, Flint, to SJL Communications. (Knight-Ridder was a top-25 group before these sales.)

3. Sale of WSMV, Nashville, by Gillett to Cook Inlet Communications.

4. WFXT, Boston, transferred from Fox Broadcasting to a trusteeship headed by Edward W. Brooke and Hugh L. Carey.

5. KTVW, Phoenix, acquired by Hallmark (Univision).

6. Pulitzer acquired WDSU, New Orleans, from Cosmos; sold WPTA, Fort Wayne, to Granite Communications.

7. Trinity sold KNAT, Albuquerque, to All American TV Inc.

The following transfers involving the 25 largest groups, announced during 1989, are not included in this report since the FCC's approvals did not occur before January 1, 1990. Resulting changes in percentages of ADI TV households, however, are shown in Table 4:

1. Fox Broadcasting's acquisition of KSTU, Salt Lake City.

2. Telemundo's acquisition of KVDA, San Antonio.

3. RKO General's sale of WHBQ, Memphis, to Adams TV. (RKO General was a top-25 group in 1988 before its sale of KHJ, Los Angeles, and WHBQ.)

Only a small change occurred in the percentage of group ownership among VHF stations in 1988-89. As 1990 began, group operators owned 89.6% of the relatively stable number of VHF stations in the top-100 markets, compared with 89.9% in 1988. Group ownership on the UHF band increased slightly, from 65.7% in 1988 to 66.3% in 1990. Despite the fact that UHF group ownership lags behind VHF, the greatest numerical

increases have occurred in the UHF band. The number of group-owned UHF stations in the top-100 markets grew from 134 in 1984, to 230 in 1988, to 260 in 1990. This increase of 126 stations in six years also is reflected in the percentage figures (60.1% in 1984; 65.7% in 1988; and 66.3% in 1990) even though the number of UHF stations in the top-100 markets grew at an astonishing rate (75.8%) during the six-year period -- from 223 to 392.[17]

Table 1
Group Ownership of U.S. TV Stations by Market Rank
January 1, 1990

Market Rank	VHF			UHF			VHF & UHF		
	No.	G/O	%	No.	G/O	%	No.	G/O	%
1-10	43	41	95.3	82	49	59.8	125	90	72.0
1-25	101	95	94.0	154	100	64.9	255	195	76.5
26-50	72	65	90.3	94	60	63.8	166	125	75.3
51-75	74	66	89.1	82	64	78.0	156	130	83.3
76-100	60	49	81.7	62	36	58.1	122	85	69.7
1-100	307	275	89.6	392	260	66.3	699	535	76.5

As Table 1 shows, group ownership predominates at every level within the top-100 markets for both VHF and UHF stations. Despite its prevalence, a significant degree of diversity exists *within group ownership*. More than 100 different entities own the 535 group stations in the first 100 markets. Furthermore, in markets of all sizes, some 207 different groups own completely or partially the licenses to 843 TV stations, an average of 4.1 stations per group. This average represents no change from 1988.

Table 2 indicates how many groups held the various numbers of television stations allowed under the FCC's "12 and 25%" rule on January 1, 1990. Significantly, 20 owners held licenses for more than seven stations and three held the maximum number as 1990 began. Overall, 31 groups owned seven or more stations five years after the Commission increased the number of stations an entity might have.[18]

Table 2
Group Ownership by Number of TV Stations
January 1, 1990

Stations Held	No. Groups	No. Stations
12	3	36
11	2	22
10	1	10
9	8	72
8	6	48
7	11	77
6	11	66
5	30	150
4	37	148
3	2	96
2	66	132
TOTAL	207	857 (a)

(a) Ownership of 14 stations is shared by two or more groups. Therefore, 843 different stations are included in this number.

Table 3
High and Low Circulation Rankings of TV Groups (1990)*

No. Stations	Highest Rank	Lowest Rank	Highest ADI TVHH Percentage	Lowest ADI TVHH Percentage
12	29	31+	19.14	1.77
11	6	6+	11.56	11.17
10	8	8	10.09	10.09
9	11	60+	10.74	0.73
8	2	62+	24.40	1.41
7	3	44+	22.43	1.72
6	1	136+	18.71	0.82
5	4	153+	20.82	0.39
4	16	174+	4.77	0.35
3	36	183+	3.88	0.23
2	41	188+	4.40	0.10

* Groups with complete circulation data.

+ One or more lower ranking groups are present, but with incomplete data.

Table 3 shows the highest and lowest rankings based on weekly circulation for groups with each of the possible numbers of stations. Wide disparities in rank and circulation continue to be evident among groups with the same number of stations.

As stated earlier, a profile of all 207 TV groups appears in Appendix A, showing numbers of stations owned, net weekly circulation, and percentages of U. S. television households reached by each group. An analysis of the NWC data (not to be confused with the FCC's ADI market reach data) for these groups reveals the following industry profile:

1) Three groups reach more than 20% of the nation's 92,100,000 television households (1989-90). However, only five groups reach as much as 15%, and only six groups serve more than 10% of the nation's TV households. These major groups include the three network owned-and-operated (O&O) groups and the Tribune, Fox, and Gillett stations.

2) In 1990, the first five groups are the same as in 1988. Tribune Broadcasting, with two cable superstations, again leads in weekly circulation with 25.2%, while its ADI percentage is 18.71. Capital Cities/ABC and GE/NBC rank second and third in *aggregate weekly circulation* (22.0% and 20.1%). With the purchase of WCIX, Miami, CBS regained fourth place with weekly circulation of 17.5% (20.82% ADI basis). Fox dropped to fifth place at 16.3%, after disposing of its Boston property, followed by Gillett (11.4%), which sold its Nashville station in 1989.

3) Nine groups now reach between 5% and 10% of the nation's TV households.[19] Twenty groups reach between 2.5% and 5.0%, while 54 groups reach between 1.0% and 2.5%. Finally, 118 groups, or more than half (57.0%) of all multiple-station licensees, reach less than 1.0% of the nation's television households each week. Of these 118 smaller group operators, 90 have a weekly circulation of less than 500,000 households (0.5%); and 57 reach fewer than 250,000 homes (0.3%) on a net weekly circulation basis. The smallest group with complete NWC data attracts only 39,800 viewing households weekly to its two stations.

The 25 highest ranking groups using the FCC's 50% formula (ADI market reach percentages) are shown in Table 4. ADI household reach data for all groups are given in Appendix A. These percentages determine how much growth any group could experience from the acquisition of additional stations, up to the limit of 12 stations and/or 25% of the nation's television households. Three groups (Capital Cities/ABC, GE/NBC, and CBS) now exceed 20%, while three others (Silver King, Tribune, and Fox) closely approach that figure. Another six groups fall between 10% and 15%, while seven groups reach between 5% and 10% of the nation's television households.

Noticeable differences exist between the rankings based on the FCC formula and those based on net weekly circulation. Even so, 19 group owners appear on both lists of the top-25 multiple station licensees. Differences between the two ranking systems (i.e., differences between potential and actual audience) result from such factors as (1) satellite and cable carriage of certain independent stations which effectively extend a station's reach; (2) ownership of several large market independent stations that engage in narrow target audience (ethnic and religious) programming; and (3) recent acquisition of stations that have not been fully developed.

Table 4
Percentage of the Nation's TV Households Reached by the 25 Largest Groups Using FCC Formula * (January 1, 1990)

Rank	Group Owner	Number of Stations	% of U.S. TVHHs	% TVHHs with Proposed Purchases/Sales
1	Capital Cities/ABC	8	24.40	
2	NBC/GE	7	22.43	
3	CBS	5	20.82	
4	Silver King (HSN)	12	19.14	
5	Tribune	6	18.71	
6	Fox	6	18.35	19.00
7	Gillett	11	11.17	
8	Trinity	11	11.56	12.31
9	Univision (Hallmark)	9	10.74	
10	United/Chris Craft	7	10.73	
11	Telemundo	7	10.16	10.47
12	Gannett	10	10.09	
13	Westinghouse	5	9.93	
14	Cox	7	8.39	
15	Scripps-Howard	9	7.66	
16	Hearst	6	6.78	
17	A. H. Belo	5	5.68	
18	Gaylord	5	5.28	
19	Midwest R & TV	5	5.19	
20	TVX Group	6	4.82	
21	Post-Newsweek	4	4.77	
22	Great American	5	4.73	
23	H & C	6	4.69	
24	Harriscope	2	4.40	
25	Pulitzer	8	4.34	

* UHF station audience coverages are discounted 50% by the FCC

Cross-Media Ownership

Two significant trends have prevailed for several years with respect to newspaper ownership of TV stations. First, a steady increase in the overall co-ownership of newspaper and television properties has occurred. Second, despite this increase in common ownership of media, a marked decline has taken place in local cross-media ownership of TV stations and daily newspapers. In 1988-89, only the second of these two trends continued to be present, as the number of commonly-owned newspapers and TV stations declined.

As shown in Table 5, 162 of the 699 TV stations in the top-100 markets were newspaper-affiliated at the start of 1990.[20]

Table 5
Newspaper Ownership of U.S. Television Stations
January 1, 1990

Market Rank	VHF			UHF			VHF & UHF		
	Total	No.	%	Total	No.	%	Total	No.	%
1-10 (a)	43	24	55.8	82	7	8.5	125	31	24.8
1-25 (b)	101	43	42.6	154	13	8.4	255	56	22.0
26-50 (c)	72	28	38.9	94	9	9.6	166	37	22.3
51-75 (d)	74	28	37.8	82	7	8.5	156	35	22.4
76-100 (e)	60	25	41.7	62	9	14.5	122	34	27.8
1-100 (f)	307	124	40.4	392	38	9.7	699	162	23.2

NOTES: The number of VHF and UHF cross-media ownerships (TV and local daily newspaper) in the above market categories are as follows:

(a) Markets 1-10: 4 VHF and 0 UHF
(b) Markets 1-25: 6 VHF and 0 UHF
(c) Markets 25-50: 6 VHF and 1 UHF
(d) Markets 51-75: 3 VHF and 0 UHF
(e) Markets 76-100: 7 VHF and 2 UHF
(f) Markets 1-100: 22 VHF and 3 UHF

This represents a decline of 12 newspaper-affiliated television stations since January 1, 1988. Nine of those stations belonged to the Knight-Ridder Company, which sold all of its television properties in 1989. With the greater number of stations on the air at the start of 1990, the percentage of newspaper-affiliated TV outlets in the 100 largest markets showed a more noticeable drop, from 26.9% to 23.2%.

The number of VHF stations affiliated with newspaper publishing interests remained much higher than for UHF, and the decline of newspaper-affiliated television properties occurred primarily in the VHF category. Note also that newspaper ownership of TV stations is relatively evenly dispersed across the four quartiles of the top-100 markets.

The number of local cross-media ownerships between daily newspapers and television stations in the top-100 markets dropped from 27 in 1988 to 25 in 1990, a decline from 4.2% to 3.6%. On a long-term basis, this represents a decrease of 35 stations since 1975, when 60 stations, or 16.1%, were commonly owned with local dailies. With three exceptions, all newspaper/television cross- media ownerships involve VHF properties.

The number of newspaper-affiliated group owners at the start of 1990 was 41, compared with 46 in 1988.

Other Media Holdings

In addition to newspaper-TV cross-ownerships, many television station owners also hold interests in radio stations, cable systems, program production companies, and other businesses. Four of the 25 largest TV firms own cable systems, while 11 publish daily newspapers, and 15 hold radio station licenses. Fifteen participate in program production for use beyond their own facilities through network origination, syndication efforts, or affiliated motion picture companies. Table 6 provides data on the cable, newspaper, radio, and program production holdings of the top-25 groups (FCC/ADI rankings).

Table 6
Other Media Holdings of Top-25 TV Group Owners
(Ranked by FCC/ADI TVHH Estimates)
January 1, 1990

Group	Rank	Cable Subs	Daily Newspapers		Radio Stations		Program Production Unit*
			No.	Circulation	AM	FM	
CC/ABC	1		7		11	10	(1)
GE/NBC	2			617,000			(1)
CBS	3				7	11	(1)
Silver King	4						(2)
Tribune	5		7	2,605,000	3	2	(3)
Fox	6		2	540,000			(1) (4)
Gillett	7				1	1	
Trinity	8				1	1	(2)
Univision	9						(2)
United/CC	10						
Telemundo	11						(2)
Gannett	12		83	6,300,000	7	9	(3)
Westinghouse	13				9	7	(3)
Cox	14	1,530,000	19	1,336,000	5	7	
Scripps-Howard	15	540,000	13	1,502,000	2	3	
Hearst	16	55,000	14	1,850,000	4	3	
A.H. Belo	17		1	355,000			(3)
Gaylord	18		1	215,000	2	1	(3)
Midwest R & TV	19				1	1	
TVX Group	20		2	825,000			(4)
Post-Newsweek	21	415,000					
Great American	22				6	10	(3)
H & C	23				1		
Harriscope	24						
Pulitzer	25		4	507,000	1	1	

*NOTES: (1) Network production, subject to limitations; (2) Network production, other; (3) Production/distribution of syndicated shows; (4) Affiliated with motion picture production firm

Endnotes

1. Amendment of Multiple Ownership Rules, 9 R. R. 1563 (1953); Television Multiple Ownership Rule Amended, 11 R.R. 1519 (1954).

2. 100 FCC 2d. 74 (1985). See 47 C.F.R. 2d 73.3555 (1986).

3. The final order also provided that a group may acquire in each broadcast service (AM, FM or TV) up to 14 stations provided at least two of the stations in its portfolio are minority controlled. For purposes of the multiple ownership rules, *minority ownership* is defined as "more than 50 percent owned by one or more members of a minority group." 47 C.F.R. Sect. 73.3555(d)(3)(iii)(1986).

4. FCC Order 84-A (1943); FCC Order 84-B (1944).

5. *Second Report and Order* (Docket 18110), 32 R.R. 2d 954 (1975).

6. *Second Report And Order* in MM Docket No. 87-7, 2208 (1989).

7. *Ibid.*

8. *Transfer of Broadcast Facilities*, Report and Order in Docket 81-897, FCC 82-519; 47 F.R. 55924; 52 R.R. 1081 (1982).

9. Arbitron defines *net weekly circulation* as "an estimate of the average number of unduplicated television households which viewed a station for at least five minutes at least once during a week. Also referred to as "net weekly audience." *The Arbitron Glossary*, June 1986, The Arbitron Company.

10. Herbert H. Howard, "Cross-Media Ownership of Newspapers and TV Stations, " *Journalism Quarterly*, 51:71 (Winter 1974).

11. Herbert H. Howard, *Group and Cross-Media Ownership of Television Stations: 1988.* (Washington, D. C.: National Association of Broadcasters, 1988), p. 15.

12. Herbert H. Howard, *Multiple Ownership in Television Broadcasting.* (New York: Arno Press, 1979), p. 183.

13. *Television and Cable Factbook* No. 58. (Washington, D.C.: Warren Publishing, Inc., 1990).

14. *Arbitron Television Universe Estimates Summary 1989-1990.* (New York: Arbitron Ratings Company, 1989), pp. 1-3.

15. *Loc. cit.*

16. Herbert H. Howard, *Group and Cross-Media Ownership of Television Stations: 1988*, *op. cit.*, p. 9.

17. Herbert H. Howard, *Group and Cross-Media Ownership of Television Stations: 1984*, (Washington: National Association of Broadcasters, 1984) p. 5; *Group and Cross-Media Ownership of Television Stations: 1988*, p. 9.

18. Groups with seven or more stations as of 1/1/90 included: Act III (7); Adams (12); American Family (7); Bahakel (8); Benedek (9); Burnham (7); Capital Cities/ABC (8); Cosmos (7); Cox (7); Gannett (10); GE/NBC (7); Gillett (11); Heritage (12); Hubbard (9); Lee (12); Lilly (9); Lin (7); Meredith (7); News- Press & Gazette (8); Park (8); Pulitzer (8); Scripps-Howard (9); Silver King (12); Smith (9); Stauffer (9); TAK Communications (8); Telemundo (7); Trinity (11); United/Chris Craft (7); Univision (9); and Young (7).

19. Groups reaching between 5% and 10% of the nation's TV households on a NWC basis include Westinghouse (9.9%), Gannett (9.6%), Cox (8.9%), United/Chris Craft (8.4%), Scripps-Howard (7.9%), Hearst (7.0%), TVX (6.0%), Gaylord (5.6%), and A. H. Belo (5.2%).

20. By newspaper-affiliated, we mean that the owner of the television station owns at least one newspaper whether in the same market or in another market.

APPENDIX A

TV GROUPS RANKED BY NET WEEKLY CIRCULATION

(WITH FCC FORMULA TV HOUSEHOLD COVERAGE)

January 1, 1990

TV Group Owner	Rank 1990	Rank 1988	# of Stations	Net Weekly Circulation	Percent of U.S. NWC	Percent of U.S. FCC
*Tribune	1	1	6	23,249,300	25.2	18.71
*CC/ABC	2	2	8	20,247,000	22.0	24.40
GE/NBC	3	3	7	18,547,600	20.1	22.43
CBS	4	5	5	16,126,300	17.5	20.82
FOX	5	4	6	15,080,600	16.3	18.35
Gillette	6	6	11	10,537,200	11.4	11.17
Westinghouse	7	7	5	9,075,600	9.9	9.93
*Gannett	8	9	10	8,837,000	9.6	10.09
*Cox	9	8	7	8,195,800	8.9	8.39
United/ Chris Craft	10	10	7	7,765,400	8.4	10.73
*Scripps-Howard	11	11	9	7,241,200	7.9	7.66
*Hearst	12	13	6	6,466,400	7.0	6.78
TVX Group	13	12	6	5,481,700	6.0	4.82
*Gaylord	14	14	5	5,144,800	5.6	5.28
*A. H. Belo	15	15	5	4,753,500	5.2	5.68

GROUPS WITH NWC BETWEEN 2.5% AND 5.0%

TV Group Owner	Rank 1990	Rank 1988	# of Stations	Net Weekly Circulation	Percent of U.S. NWC	Percent of U.S. FCC
*Post-Newsweek	16	16	4	4,470,100	4.9	4.77
Lin	17	17	7	4,302,800	4.7	4.29
Great American	18	19	5	3,965,200	4.3	4.73
H & C Communic.	19	20	6	3,948,300	4.3	4.69
*Pulitzer	20	21	8	3,813,200	4.1	4.34
Meredith	21	23	7	3,492,200	3.8	3.80
Renaissance (Odyssey)	22	55	5	3,457,400	3.8	3.31
*Times-Mirror	23	22	4	3,453,400	3.7	4.06
*Albritton	24	25	5	3,074,700	3.3	3.49
Viacom	25	27	5	2,911,900	3.2	3.06
*Chronicle Broadcasting	26	28	5	2,725,900	3.0	4.19
McGraw-Hill	27	32	4	2,715,900	2.9	3.11
Outlet	28	34	4	2,674,300	2.9	2.55
X#Heritage	29	30	12	2,647,200	2.9	2.79
#Hubbard	30	33	9	2,528,200	2.7	5.65
*Adams TV	31	31	12	2,485,900	2.7	1.77
*Multimedia	32	29	4	2,408,900	2.6	2.66
*+Lee	33	36	9	2,382,100	2.6	3.27
Cosmos	34	26	7	2,381,700	2.6	1.93
+King	35	35	5	2,327,800	2.5	2.81

GROUPS WITH 1.0% TO 2.5% PENETRATION OF U.S. TV MARKET

TV Group Owner	Rank 1990	Rank 1988	# of Stations	Net Weekly Circulation	Percent of U.S. NWC	Percent of U.S. FCC
Anchor Media	36	63	3	2,189,000	2.4	2.54
*Park	37	40	8	2,185,600	2.4	2.17
Combined (Grant)	38	37	3	2,171,100	2.4	3.88
American Family	39	47	7	2,158,400	2.3	1.83
#Young	40	109	7	2,119,200	2.3	2.31
Dudley Taft	41	41	2	2,009,200	2.2	2.04
+Malrite	42	39	4	1,966,900	2.1	1.47
*New York Times	43	50	5	1,957,500	2.1	1.64
Act III	44	80	7	1,946,000	2.1	2.07
Fisher	45	44	2	1,817,200	2.0	2.29
Lilly (SJL)	46	64	9	1,810,000	2.0	3.32
#Capitol Bcstg.	47	99	4	1,801,200	2.0	2.55
Kelly	48	46	2	1,783,000	1.9	2.50
Media General	49	48	3	1,736,000	1.9	1.94
*Freedom Nprs.	50	43	5	1,711,900	1.9	1.79
#Midwest Comm.	51	45	5	1,697,600	1.8	5.19
Nationwide	52	49	4	1,695,600	1.8	2.07
*Bonneville	53	51	2	1,610,000	1.7	2.06
Cook Inlet	54	--	2	1,604,500	1.7	1.77
+Burnham	55	67	7	1,599,700	1.7	1.72
TV Station Partners (1)	56	38	5	1,573,200	1.7	1.50

TV Group Owner	Rank 1990	Rank 1988	# of Stations	Net Weekly Circulation	Percent of U.S. NWC	Percent of U.S. FCC
Chase	57	89	3	1,566,800	1.7	1.39
*Columbus Dispatch	58	52	2	1,547,800	1.7	1.68
+Commercial Radio Institute	59	58	4	1,517,500	1.6	1.99
#Smith	60	57	9	1,460,500	1.6	2.91
Bahakel	61	60	8	1,449,400	1.6	1.41
*#News Press & Gazette	62	71	8	1,433,900	1.6	1.90
Koplar	63	59	2	1,390,900	1.5	1.77
Pappas TV	64	84	4	1,370,100	1.5	1.10
*Providence Journal	65	88	4	1,367,500	1.5	1.61
#Midwest TV	66	62	4	1,320,300	1.4	1.62
Narragansett	67	--	2	1,297,900	1.4	1.24
*Gateway	68	61	4	1,282,300	1.4	1.35
+Benedek	69	74	9	1,190,800	1.3	0.74
*South Bend Tribune	70	68	4	1,188,000	1.3	1.00
Jefferson-Pilot	71	70	2	1,164,400	1.3	1.27
Granite	72	--	4	1,151,400	1.3	2.74
X-Dudley	73	--	6	1,142,200	1.2	1.59
*Milwaukee Journal	74	65	3	1,140,200	1.2	1.37
Osborne	75	--	5	1,123,500	1.2	1.26

TV Group Owner	Rank 1990	Rank 1988	# of Stations	Net Weekly Circulation	Percent of U.S. NWC	Percent of U.S. FCC
Ackerley	76	77	5	1,122,700	1.2	2.27
Charles Woods	77	87	5	1,112,700	1.2	1.00
+TAK Comm.	78	110	8	1,110,300	1.2	1.18
X-Diversified	79	78	5	1,090,600	1.2	0.65
#Busse	80	53	4	1,077,800	1.2	1.42
*Guy Gannett	81	75	4	1,047,900	1.1	1.02
+Univision (Hallmark)	82	83	9	1,032,100	1.1	10.74
Spartan Radio	83	79	3	1,024,700	1.1	1.02
X-McKinnon	84	105	4	1,008,100	1.1	1.04
Citadel	85	73	6	995,000	1.1	1.36
*Evening Telegram	86	82	5	985,900	1.1	1.07
Palmer	87	97	2	964,400	1.0	1.05
*Quincy Newspapers	88	90	5	922,300	1.0	0.77
Wilson	89	76	3	919,400	1.0	1.45
GROUPS WITH LESS THAN 1% PENETRATION						
Clear Channel	90	--	4	884,400	1.0	0.93
H-R	91	94	2	840,700	0.9	0.70
*Birney Imes	92	106	4	825,000	0.9	2.83
Atlantic	93	---	2	772,000	0.8	0.92
Retlaw	94	91	6	768,500	0.8	0.82

TV Group Owner	Rank 1990	Rank 1988	# of Stations	Net Weekly Circulation	Percent of U.S. NWC	Percent of U.S. FCC
Media Central	95	81	5	754,800	0.8	1.68
#Griffin	96	96	3	730,100	0.8	.84
*Morris	97	153	4	701,200	0.8	.76
+Telemundo	98	100	7	700,200	0.8	10.16
*Toledo Blade	99	102	4	676,800	0.7	.52
*#Stauffer	100	103	9	652,200	0.7	.73
MT Communic.	101	---	3	636,800	0.7	.88
Civic	102	132	4	631,700	0.7	.74
Maine Bcstg.	103	108	3	593,200	0.6	.59
*Gray	104	107	3	582,400	0.6	.44
Glazer	105	101	4	582,000	0.6	.47
Corridor	106	104	2	574,300	0.6	2.07
Shamrock	107	111	3	574,200	0.6	.40
Lewis	108	112	3	553,100	0.6	.39
*Manship	109	114	2	548,900	0.6	.50
+Pegasus	110	92	3	546,800	0.6	.78
Sunbelt	111	---	4	542,100	0.6	1.11
*Evening Post	112	116	5	526,400	0.6	.64
Lamco	113	115	3	515,900	0.6	.49
Harron	114	113	2	515,600	0.6	.48
Robinson	115	139	3	509,700	0.6	.83
MMC (Pruett)	116	---	3	509,300	0.6	.60

TV Group Owner	Rank 1990	Rank 1988	# of Stations	Net Weekly Circulation	Percent of U.S. NWC	Percent of U.S. FCC
Farragut	117	---	3	502,100	0.5	.83
SW Multimedia	118	145	4	498,700	0.5	.55
*Price	119	42	3	498,100	0.5	.44
Wabash Valley	120	122	3	491,300	0.5	.37
F. K. Spain	121	123	2	490,900	0.5	.46
#Heritage Group (Icobelli)	122	---	3	486,300	0.5	.63
Sarkes Tarzian	123	117	2	478,900	0.5	.52
Bluegrass	124	120	2	444,800	0.5	.40
Goltrin (Davis-Goldfarb)	125	---	3	439,800	0.5	.41
X-Cannan	126	129	2	432,500	0.5	.40
ML Media(1)	127	119	2	425,500	0.5	.38
Gilmore	128	125	2	419,900	0.5	.31
#Marsh Media	129	128	5	415,400	0.5	1.34
Bostick/LBJ	130	98	3	411,200	0.4	.62
#Beam	131	86	5	402,100	0.4	.56
Family Group	132	135	6	398,900	0.4	1.00
*+Wooster Republican	133	127	5	394,900	0.4	.39
#Wheeler	134	---	3	375,400	0.4	.69
Great Trails	135	131	2	370,400	0.4	.15
X#Cal-Oregon	136	133	6	366,700	0.4	3.10
*Home News	137	138	2	355,100	0.4	.29

TV Group Owner	Rank 1990	Rank 1988	# of Stations	Net Weekly Circulation	Percent of U.S. NWC	Percent of U.S. FCC
J. H. Phipps	138	---	2	333,200	0.4	.49
#Northwest TV (Eugene)	139	141	4	322,500	0.4	.77
American Telecasters	140	137	4	310,500	0.3	.73
Waterman	141	147	2	302,600	0.3	.16
R. H. Drewry	142	143	2	301,100	0.3	.38
Draper	143	118	2	299,100	0.3	.27
#Mid-Continent	144	146	4	297,000	0.3	.83
X+Landford	145	142	5	294,900	0.3	1.32
#Hanna	146	149	3	293,300	0.3	.64
+Love	147	144	3	291,900	0.3	.30
X+Amaturo	148	---	4	282,200	0.3	1.10
#Craig Fox	149	165	5	280,600	0.3	.97
D & K	150	---	2	256,900	0.3	.32
*#Fargo Forum	151	151	4	249,800	0.3	.64
Pikes Peak	152	152	2	249,300	0.3	.33
Withers	153	148	5	232,900	0.3	1.47
+Tri State Christian	154	182	3	229,100	0.2	1.01
Frey & Tidings	155	121	2	223,700	0.2	.23
Brechner	156	159	2	214,900	0.2	.13
X-Carney	157	162	2	208,500	0.2	.46
Seaway	158	155	2	207,200	0.2	.31

TV Group Owner	Rank 1990	Rank 1988	# of Stations	Net Weekly Circulation	Percent of U.S. NWC	Percent of U.S. FCC
Federal	159	158	2	206,400	0.2	.09
+LeSea	160	157	5	193,400	0.2	2.58
+Weigel	161	---	2	188,900	0.2	2.12
Corpus Christi	162	160	2	176,500	0.2	.23
*United Comm.	163	161	2	173,900	0.2	.12
Precht	164	164	4	172,100	0.2	.29
Resort	165	163	2	171,900	0.2	.10
Green Group	166	166	2	158,200	0.2	1.52
Sigma (Hernrich)	167	168	2	150,900	0.2	.21
#Abilene	168	---	2	146,400	0.2	.18
Meyer	169	167	4	144,900	0.2	.64
#First Capital	170	---	2	140,100	0.2	.32
Reiten	171	169	4	128,700	0.1	.64
Sudbrink	172	124	2	128,200	0.1	1.97
#Red River	173	---	4	126,100	0.1	.84
#Duhamel	174	172	4	118,100	0.1	.35
Act I	175	134	2	104,300	0.1	.45
#Mark Adams	176	---	2	101,100	0.1	.27
+New South	177	---	3	101,000	0.1	.28
#Beach Partners	178	---	2	95,800	0.1	.94
+Trinity	179	173	11	91,900	0.1	11.56

TV Group Owner	Rank 1990	Rank 1988	# of Stations	Net Weekly Circulation	Percent of U.S. NWC	Percent of U.S. FCC
+Silver King (Home Shopping)	180	85	12	91,700	0.1	19.14
New Life	181	177	2	91,300	0.1	.69
#Ambassador	182	---	2	84,200	0.1	.13
Big Horn	183	---	3	79,200	0.09	.23
+Christian TV Network	184	175	6	58,200	0.06	2.22
+Dove	185	174	4	55,800	0.06	.54
#Cornerstone	186	184	2	43,200	0.05	.79
+Grand Canyon	187	---	2	43,200	0.05	1.12
Miami Valley Christian	188	181	2	39,800	0.04	.62
#+Sainte	189	180	3	30,600	0.03	.73
+Echonet	190	---	2	27,400	0.03	.57
+All American	190	183	5	15,000	0.02	2.54
+Blackstar	191	---	3	N. A.	----	1.85
+Alaska Network	191	184	3	N. A.	----	N. A.
+Sonlight	191	---	2	N. A.	----	.59
+Beindorf	191	---	2	N. A.	----	2.69
+Century (Bay)	191	---	2	N. A.	----	N. A.
+Christian Faith	191	---	2	N. A.	----	.57
+Harriscope	191	179	2	N. A.	----	4.40
+Leake	191	184	2	N. A.	----	N. A.

TV Group Owner	Rank 1990	Rank 1988	# of Stations	Net Weekly Circulation	Percent of U.S. NWC	Percent of U.S. FCC
+Teleonce	191	184	2	N. A.	----	N. A.
+Northern TV	191	184	2	N. A.	----	N. A.
+Oceania	191	---	2	N. A.	----	N. A.
+Wisconsin Voice	191	184	2	N. A.	----	.63
+Multi-Media Television	191	184	2	N. A.	----	N. A.
+Three Star	191	184	2	N. A.	----	N. A.
+National MinorityTV	191	---	2	N. A.	----	.52
+Mundovision	191	---	2	N. A.	----	.11

Total Number of Groups: 207

NOTES:

* - Designates groups that are owned by or affiliated with a newspaper publishing company.

+ - Circulation data for one or more stations were not available.

- Includes one or more satellite stations.

X - Ownership of one or more stations is shared with another group.

(1) The two principals of ML Media Partners also are principals in the TV Station Partners group.

APPENDIX B

1989-90 ADI MARKET RANKINGS AND PERCENT OF U.S. TV HOUSEHOLDS TOP 100 MARKETS

1989-9[illegible] Arbitron Television Markets and Ranking Guide

ADI Rank	Market Name	% of U.S.
1	New York	7.68
2	Los Angeles	5.38
3	Chicago	3.41
4	Philadelphia	2.95
5	San Francisco (Oakland-San Jose)	2.40
6	Boston	2.29
7	Dallas-Fort Worth	1.88
8	Detroit	1.88
9	Washington	1.85
10	Houston	1.58
11	Cleveland	1.57
12	Atlanta	1.50
13	Minneapolis-St. Paul	1.45
14	Tampa-St. Petersburg (Sarasota)	1.44
15	Seattle-Tacoma	1.41
16	Miami	1.40
17	Pittsburgh	1.27
18	St. Louis	1.22
19	Denver	1.14
20	Phoenix	1.09
21	Sacramento-Stockton	1.09
22	Baltimore	1.02
23	Hartford-New Haven	.98
24	San Diego	.95
25	Orlando-Daytona Beach-Melbourne	.94
26	Indianapolis	.93
27	Portland, OR	.88
28	Milwaukee	.83
29	Kansas City	.82
30	Cincinnati	.81
31	Charlotte	.79
32	Nashville	.79

ADI Rank	Market Name	% of U.S.
33	Raleigh-Durham	.76
34	Columbus, OH	.75
35	Greenville-Spartanburg-Asheville	.70
36	New Orleans	.70
37	Grand Rapids-Kalamazoo-Battle Creek	.68
38	Buffalo	.67
39	Memphis	.66
40	Oklahoma City	.65
41	Salt Lake City	.65
42	Norfolk-Portsmouth-Newport News-Hampton	.63
43	San Antonio	.62
44	Providence-New Bedford	.61
45	Harrisburg-York-Lancaster-Lebanon	.60
46	Louisville	.60
47	Birmingham	.57
48	Charleston-Huntington	.57
49	Greensboro-Winston Salem-High Point	.56
50	West Palm Beach-Ft. Pierce-Vero Beach	.56
51	Albuquerque	.55
52	Dayton	.55
53	Albany-Schenectady-Troy	.53
54	Wilkes Barre-Scranton	.53
55	Mobile-Pensacola	.51
56	Jacksonville	.51
57	Little Rock	.50
58	Tulsa	.50
59	Flint-Bay City-Saginaw	.49
60	Richmond	.48
61	Wichita-Hutchison	.47
62	Fresno-Visalia	.47
63	Toledo	.45
64	Knoxville	.44
65	Shreveport-Texarkana	.44
66	Des Moines	.42
67	Green Bay-Appleton	.42
68	Syracuse	.40
69	Roanoke-Lynchburg	.40
70	Lexington	.40
71	Austin, TX	.39
72	Rochester, NY	.38
73	Omaha	.38

ADI Rank	Market Name	% of U.S.
74	Portland-Poland Spring	.37
75	Springfield-Decatur-Champaign	.37
76	Paducah-Cape Girardeau-Harrisburg-Marion	.36
77	Spokane	.35
78	Davenport-Rock Island-Moline	.34
79	Tucson	.34
80	Huntsville-Decatur-Florence	.33
81	Cedar Rapids-Waterloo-Dubuque	.33
82	Columbia, SC	.33
83	Springfield, MO	.32
84	Chattanooga	.32
85	South Bend-Elkhart	.32
86	Jackson, MS	.32
87	Bristol-Kingsport-Johnson City	.31
88	Johnstown-Altoona	.31
89	Youngstown	.30
90	Madison	.30
91	Las Vegas	.29
92	Burlington-Plattsburgh	.29
93	Evansville	.29
94	Baton Rouge	.28
95	Lincoln-Hastings-Kearney	.28
[illegible]	Ft. Myers-Naples	.27
[illegible]	Waco-Temple-Bryan	.27
98	Springfield, MA	.27
99	Colorado Springs-Pueblo	.26
100	Sioux Falls-Mitchell	.26